RESULTS 1988

TWENTY-FIRST ANNUAL SURVEY OF CORPORATE RELOCATION POLICIES

Atlas® Van Lines

World-Class Moving®

TWENTY-FIRST ANNUAL SURVEY
SUMMARY OF FINDINGS

The Survey

In March 1988 Atlas Van Lines completed its Twenty-First Annual Survey of Corporate Relocation Policies. Since the inception of this survey in 1968, it has been a widely read source of reference for major segments of the relocation industry in particular and for the transportation industry in general. Users of moving and relocation services find the survey useful for understanding policy profiles and trends. Providers of these services — van lines, relocation firms, forwarders — use it to stay abreast of their customers' attitudes concerning employee relocations.

Respondent Profile

Nearly four fifths (77%) of the survey returns this year were from individuals in personnel or human resources departments. Individuals involved in transportation or traffic-related departments accounted for only 17% of the respondents. The shift in the respondent base toward personnel-related departments has apparently continued. Five years ago 58% of the respondents represented personnel-related functions (23% represented traffic functions). Ten years ago only 37% were from personnel departments, with the majority (52%) of respondents representing traffic or transportation departments.

More than 60% of the surveyed group were manager or director level within their companies and 65% of these people were each responsibile for up to 100 employee relocations in 1987.

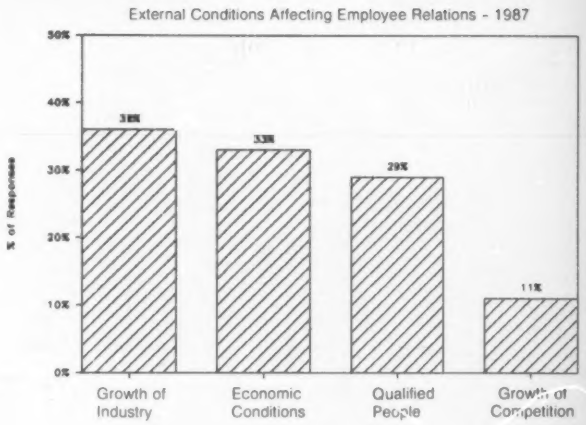
Company Profile

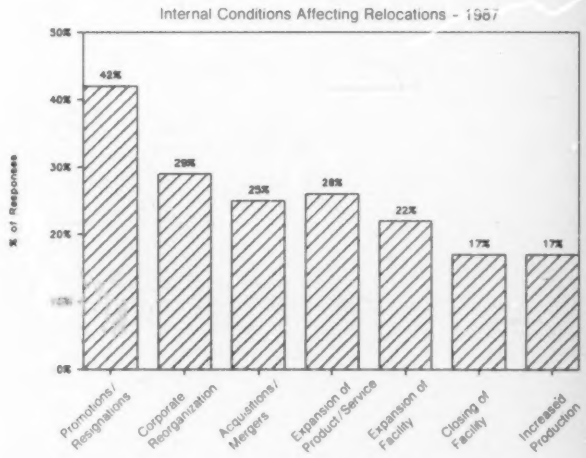
The companies represented in the survey covered a broad cross section of industries. The largest general category of representation was from firms involved in manufacturing (44%). Most of the companies operated on a national or international basis (78%), had more than five hundred salaried employees (62%), and had annual revenues in excess of $100 million (70%).

In general, these firms relocated up to 5% of their employees in 1987. The majority of them (83%) administered employee relocations through a centralized department or location.

Relocation Trends

46% of the survey believed that in 1987 employee relocations were more numerous than the previous year. The reasons underlying these feelings were related to conditions in the gerneral economic environment and in the environments of the companies they represent.





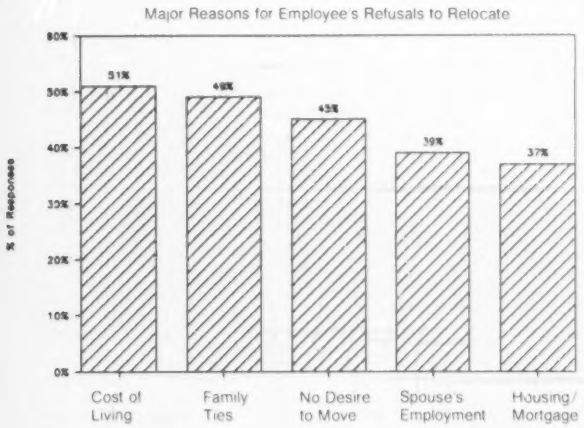
The percentage of respondents indicating that acquisition/mergers (25%) and reorganizations (29%) caused a shift in employee relocations is considerably higher than in our previous surveys. This suggests that the "merger-mania," evidenced in 1987, did play some significant role in the level of employee relocations.

According to approximately 80% of our respondents, the level of employee relocations in 1988 should be equal to (54%) or greater than (27%) the level of relocations in 1987.

Who is being relocated and how do they feel about it? Generally, a relocated employee is male (95%), most frequently in the 25 to 40 age range (86%), and receiving an annual salary in excess of $25,000 (94%). The employees most likely to be relocated, according to our respondents, tend to work in Sales/Marketing (53%) or Plant/Facility Management (21%) functions. The majority

surveyed (73%) believed that the average moving employee was relocated less than once every five years.

Almost 75% of the survey indicated that at least one employee had declined a relocation opportunity in 1987. This finding is consistent with responses to this question in our earlier surveys, and most respondents (80%) felt that the number of refusals was similar to that in 1986.



Does a refusal to relocate actually hinder an employee's career? A majority believed that refusing to move did hurt the employee's career, but a significant percentage (43%) did not feel it had any effect.

Relocation Policy Update

Almost all of the respondents were employed by companies that had formal, written relocation policies. Only 14% did not have formal policies. More than 60% had rather long established policies that had been in effect, with revisions, for seven or more years. As mentioned earlier, the majority of these companies (83%) administered these policies through centralized departments or locations. Regardless of the mode of administration (centralized or decentralized), the companies largely controlled the selection of household goods to be used in the employee's relocation. In many instances, the company worked with the employee in making the final selection.

For the most part, the policies formulated generally provided more benefits for transferred employees than for new hires. But in 40% of the responses, it was indicated that new hires and transferees received equal relocation benefits.

The predominate percentage of companies represented appeared to rely upon their internal resources to provide relocation policy information to their employees. The general method for providing this information was through printed information plus explanation by authorized personnel. Less than 1% of the companies reported using a relocation firm for this purpose.

Only 27% of the survey base actually indicated that their company's relocation policy had changed in 1987. When changes occurred, they tended to be in the form of expanded or more liberalized policies (37%), increased housing assistance (38%), or improved insurance coverage (18%). A relatively small segment (15%) indicated that changes made resulted in a more restrictive policy.

As we have evidenced in our earlier surveys, the majority of companies have policies that allow for services beyond packing and transportation of basic household goods. Two thirds of our survey placed no weight restrictions on their empolyees' moves. Usually all of the respondents indicated that automobile transportation (83%) and transportation of recreation and lawn equipment (75%) were allowable under their companies' polices. Perhaps a sign that some policies are reflecting current lifestyles is that one third indicated their policies allowed for transportation of satellite TV dishes.

Policies continue to address the need for relocating employees to become acquainted with their new locations. Approximately 50% provided two expense-paid visits for the employee and 44% allowed two expense-paid (spouse accompanied) house-hunting trips. The allowable duration of these trips were generally either three to four days (39%) or five to six days (34%).

The overwhelming majority (86%) of the companies did not provide employment location assistance to a relocating employee's spouse. This particular policy restriction will bear continued scrutiny since the employment status of one's spouse does appear to have some bearing upon the relocation decision. About 30% of the survey felt that the employment of the spouse was frequently or almost always a factor in relocation. Further, 39% indicated that spouse employment status was a reason leading to an employee's refusal to relocate.

With regard to value coverage, the majority of firms allowed for transportation of household goods at full replacement value (64%). Of those companies not having this provision, 88% did not plan to provide it in the future.

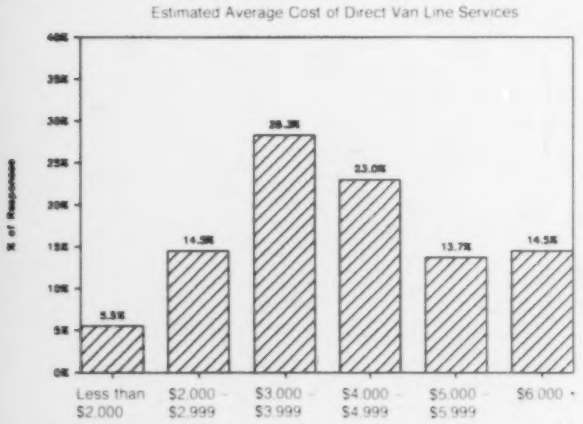
Home Selling and Purchase Assistance

Close to 80% of the respondents were employed by companies that provided for at least some level of assistance in home selling and/or buying. Ten years ago (1977) our survey showed that about 60% offered such assistance of any form.

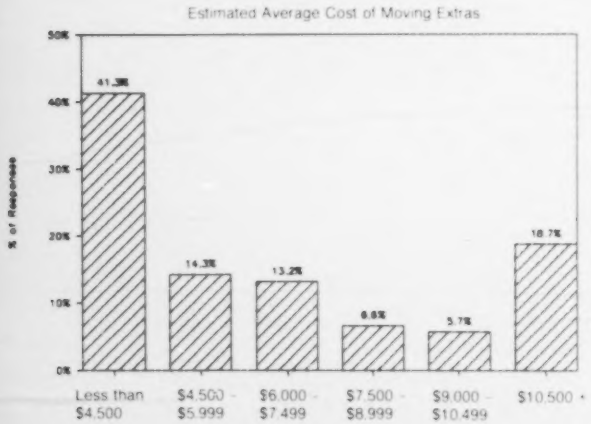
Among those companies offering assistance, the most frequently indicated actions were related to fees connected with home sale or purchase (67%), or lease termination penalties (65%). An actual purchase of the employee's former residence was indicated by a significant percentage (42%) of the respondents.

Relocation-Related Costs

The most frequently indicated general range of estimated cost for direct van line packing and transportation services is $3,000-$5,000. Almost 30% of the survey stated that such costs were in excess of $5,000.



In terms of "moving extras" (hotels, family transportation, meals, house-hunting trips, etc), almost 70% of the companies estimated these costs to be $7,500 or less. Almost 20% stated they believed these costs to exceed $10,500.



Total moving-related expenses (direct van line costs plus moving extras) appear to be a significant element in the overall cost of relocation. About one third of the survey respondents estimated that these expenses represented at least 50% of the total cost of employee relocation.

Relationships with Household Goods Carriers

Virtually all of the respondents surveyed were employed by companies having contractual agreements for employee relocations. 92% had such agreements, contrasted with only 55% of the firms in our survey of five years ago (1982). The proportion of companies having contracts for the handling of employee relocations is far greater than the reported percentage having agreements in other carriage areas. This disparity may in part be reflective of the fact that such a large segment of this study's base were representatives of personnel and human resource functions.

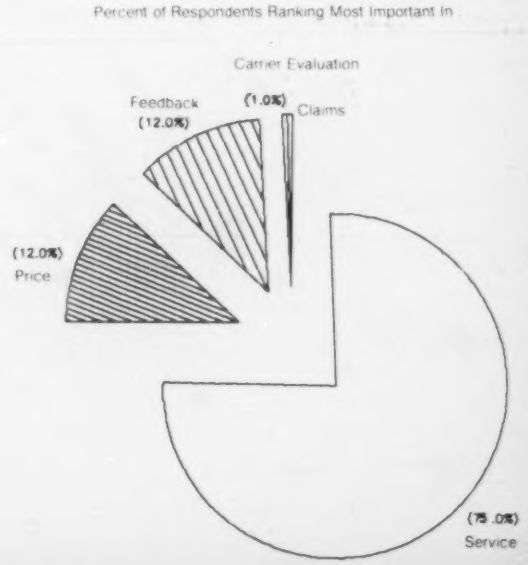
Where contractual agreements exist, companies appear to have such agreements with more than one household goods carrier. More than 70% of the survey had contracts with more than one carrier for the handling and transportation of household goods. In fact, one quarter of the companies represented had such contracts with at least four carriers.

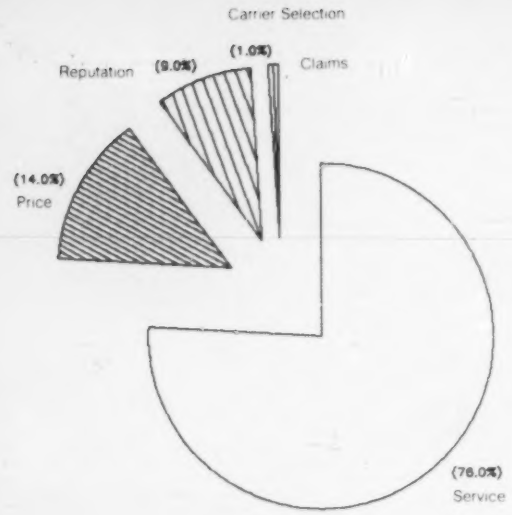
Of the respondents, 48% stated that service was the primary reason for entering into these contractual agreements. Cost control was the second most frequently indicated reason for these contracts as 37% indicated this factor.

By and large, the respondents felt that their companies' experiences with relocation contracts were favorable. 96% indicated that this experience was "good" (51%) or "excellent" (45%).

Household Goods Carrier Selection

Repeating the findings of our earlier surveys, service remains as the most important factor in household goods carrier evaluation and selection:





Use of Relocation Services

Somewhat less than 50% of respondent companies utilized the services of a relocation service (41%) or brokerage firm (8%) in 1987. This percentage of users has not changed appreciatively in five years. While relocation firms had been used for a variety of purposes, their major usage was in those areas related to real estate sale and purchase. 89% of the companies using relocation firms indicated this type of usage.

In 1987, a significant percentage (42%) of the firms utilized relocation firms to conduct employee orientation tours in their new locations. The level of this type of usage is well above that of five years ago.

International Relocations

40% of our respondents represented companies that conducted international relocations. Most of these companies (56%) utilized van lines as their primary contacts for international employee moves, with a significant percentage (38%) working with forwarders for this type of relocation service.

Other Important Findings

- The summer months continue to be the busiest periods for employee relocations. 56% of the respondent companies reported that they made most of their moves during the June through August period.

- While most companies did not express interest in "one stop shopping" as a means of securing all of their needed relocation services — real estate services, transportation, counseling, etc. — a significant percentage of 36% did indicate interest in the concept.

- A very strong majority of the respondents felt that deregulation in the household goods moving area has had a positive effect. Almost 85% felt that deregulation has resulted in better circumstances, for all or at least some of the users of household goods carriers. The strength of satisfaction in this area is more evident when it is compared to the fact that 67% of these repondents believed that deregulation in the airline industry has had such positive effects.

- An overwhelming majority of the companies surveyed made full reimbursement to employees for moving expenses (84%).

- In those instances in which a company actually purchases a relocating employee's previous residence (42% of the time), the home price is generally determined by the average of several appraisals.

- Apparently, a relatively small percentage of employees, actually leave their companies after they have been relocated. 73% of our survey stated that less than 10% of transferred employees depart the company after relocation, 22% believed that no employees actually left their companies after relocating.

- When asked to assume the perspective of the relocating employee, the survey respondents felt that the individuals one encountered at the origin (packer, salesperson/origin agent, driver) were the most critical aspects of a move.

The 21st Annual Survey is available at no charge from the Atlas Van Lines Public Information Department. For additional information, please contact James E. Huth II, Director, Corporate Communications, Atlas Van Lines, Inc., 1212 St. George Road, Evansville, IN, 47711.

On behalf of Atlas Van Lines and the entire household goods moving industry, many thanks to the corporate executives who took the time and effort necessary to complete this questionnaire. Their participation in helping to develop this unique and valuable guideline will contribute greatly to continued improvement in household goods moving services.

Permission is hereby granted to reproduce findings and data, in whole or in part, with credit to Atlas Van Lines, Inc.

21st Annual Survey of Corporate Relocation Polices

conducted by

ATLAS VAN LINES, INC.

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Survey questions indicated either by, "Check each applicable response," or by, "(circle appropriate response to each question)," will have percentage totals exceeding 100%.

PART A -- Corporate Profile

1. Which one of the following categories best represents the focus of your department?

56.3% - Human Resources/Personnel
16.6% - Traffic/Transportation
09.6% - Administration
07.4% - Compensation and Benefits
05.2% - Relocation Services
04.7% - Other

2. Which one of the following categories best describes your position within the company?

00.2% - President
10.3% - Vice President
02.4% - Assistant Vice President
48.0% - Manager
13.1% - Director
00.0% - Owner
00.2% - Major Stockholder
25.4% - Other

3. How long has your company had a formal relocation policy?

13.6% - No formal policy, each relocation is dealt with as it arises
01.7% - Less than 1 year
09.0% - 1-3 years
13.6% - 4-6 years
61.9% - 7 years or more

4. Are you . . .

60.7% - Male?
39.2% - Female?

5. Approximately how many employee relocations, within the U.S., was your company responsible for in 1987?

27.2% - 0-9
11.6% - 10-19
14.3% - 20-49
12.3% - 50-99
14.3% - 100-199
06.1% - 200-299
13.8% - 300 or more

6. Does your company administer employee relocations from a centralized department or are relocations administered on a decentralized (regional, local office) basis?

83.0% - Centralized
16.9% - Decentralized

7. If you answered "Centralized" to question A-6, does your company's centralized relocation department (circle appropriate response to each question) . . .

Yes

41.3% - Control air carrier selection?
63.2% - Control freight carrier selection?
87.5% - Control household goods carrier selection?
46.8% - Handle office relocations?
21.8% - Recommend site and space selection for office relocations?
36.4% - Handle air travel via commercial airline?

8. If you answered "Decentralized" to question A-6, who selects the carrier that is responsible for your employee's move?

43.7% - The company
09.3% - The employee
37.5% - The company and the employee together
04.6% - A relocation firm
04.6% - Other

9. Which one of the following classifications best represents the nature of your industry?

15.1% - Banking, finance, accounting, insurance
04.6% - Industrial machinery and equipment
06.4% - Retail, wholesale
05.9% - Food manufacturing and distribution
04.8% - Public utilities and communication
02.3% - Transportation
04.1% - Chemicals and plastics
05.6% - Petroleum and gas
01.2% - Aeronautics
02.0% - Wood and paper
00.0% - Diversified financial services
03.0% - Pharmaceuticals, cosmetics
06.1% - Metals manufacturing
05.1% - Computers, business machines
01.5% - Textiles, clothing, carpeting
02.0% - Publishing, printing
02.8% - Automotive manufacturing
01.0% - Hardware, appliances, houseware
00.7% - Rubber products
24.9% - Other

10. Is your company . . .

21.3% - Regional?
32.8% - National?
45.7% - International?

11. Your company's approximate annual sales for 1987 were . . .

03.6% - Less than $10 million?
13.9% - $10-$49 million?
12.2% - $50-$99 million?
26.7% - $100-$499 million?
43.4% - $500 million or more?

12. How many salaried (that is, non-hourly) people are employed by your company?

12.4% - Less than 100
25.1% - 100-499
12.6% - 500-999
27.6% - 1,000-4,999
22.1% - 5,000 or more

13. What percentage of those salaried employees did your company move or relocate during 1987?

06.6% - None
66.8% - Less then 5%
21.0% - 05%-10%
05.4% - 11% or more

14. Which one of the following categories most accurately describes the frequency with which an average salaried employee of your company can reasonably expect to be moved?

05.8% - Every two years or more often
21.3% - Once every three to five years
72.8% - Less frequently than once every five years

15. In 1987, what percentage of your transferred employees were women?

28.8% - None
49.7% - Less than 5%
10.7% - 5%-10%
10.7% - 11% or more

16. Do you anticipate that the number of employees your company will move during 1988 will . . .

26.5% - Increase from the number moved in 1987?
19.4% - Decrease from the number moved in 1987?
54.0% - Remain about the same as the number moved in 1987?

17. Comparing the number of employee transfers in 1987 with 1986, the 1987 number . . .

11.3% - Increased greatly versus 1986?
34.8% - Increased moderately versus 1986?
04.6% - Decreased greatly versus 1986?
11.6% - Decreased moderately versus 1986?
37.5% - Remained about the same as 1986?

18. If the number of employee transfers changed from 1986 to 1987, what external conditions had the most significant impact on that number? Check each applicable response.

33.3% - Economic conditions
35.8% - Growth of industry
29.3% - Lack of qualified people locally
07.9% - Growth of domestic competition
02.8% - Growth of international competition
21.3% - Other

19. What internal company conditions affected the change in the number of employee transfers from 1986 to 1987? Check each applicable response.

16.5% - Increased production
05.7% - Decreased production
21.5% - Expansion of facility
17.1% - Closing of facility
26.0% - Expansion of product or service into new territories
11.7% - Budget constraints
25.3% - Acquisitions/mergers
28.8% - Corporate reorganization
42.2% - Promotions/resignations
05.0% - International expansion
07.3% - Other

PART B -- Corporate Profile

1. How did your corporate relocation policy change during 1987? Check each applicable response.

37.7% - Increased housing assistance with housing problems
18.4% - Improved insurance programs
00.0% - Exceptions to the policy were made if individual circumstances so warranted
00.0% - Expanded benefits other than housing assistance
00.0% - Did not change
36.8% - Created a more liberal policy
14.9% - Created a more limited policy
14.9% - Other

2. How is information about your company's employee transfer policy made known to your employees?

15.5% - Employee is provided printed material describing all procedures and conditions
50.4% - Employee is provided printed material describing company policies, and this information is also explained by authorized personnel within the company
09.0% - Pre-move counseling is provided within the company
23.9% - There is no set policy--each case is handled individually and explained on a one-to-one basis
00.3% - Professional counseling is provided by a relocation firm
00.6% - Other

3. How does your company conduct moving expense reimbursement?

84.1% - Full reimbursement of moving expenses
14.5% - Partial reimbursement based on salary, position, tenure, etc.
01.2% - No reimbursement of moving expenses

4. Besides the packing and transportation of household goods, does your company allow the relocating employee (circle appropriate response to each question) . . .

Yes

83.2% - To move an automobile at company expense?
56.0% - To move a second automobile at company expense?
26.9% - To move a boat at company expense?
38.5% - To have belongings picked up from a secondary residence (summer home, relative's home, etc.)?
08.1% - To hire temporary maid service at either the old or the new residence?
66.6% - To move unlimited weight?
18.5% - Permanent storage of some possessions?
58.2% - To move collections of highly valuable objects like statuary, paintings, and antiques?
43.7% - To move pets?
74.5% - To move recreation and lawn equipment?
33.3% - To move satellite TV dishes?

5. How many expense-paid trips does your company allow an employee in order to find housing in the new location?

01.5% - None
35.4% - One
49.4% - Two
08.2% - Three
05.2% - Four or more

6. What is your average number of days allowed for a house-hunting trip?

10.5% - 1-2
39.4% - 3-4
33.5% - 5-6
16.4% - Other

7. How many expense-paid, house-hunting trips does your company allow the spouse to accompany your employee?

02.5% - None
41.8% - One
44.4% - Two
11.1% - Three or more

8. How does your company assist, if at all, an employee's spouse in finding employment in the new location?

86.3% - No assistance
04.0% - Pay job-finder's fee
01.3% - Find employment within the company
08.2% - Find employment outside the company
00.0% - Pay spouse's full or partial salary until hired

9. With regard to buying or selling an employee's home, does your company or its authorized representative (circle appropriate response to each question) . . .

Yes

17.2% - Pay none of the selling costs?
10.7% - Pay only the real estate commission?
66.5% - Pay all fees connected with the purchase or sale of the house (lawyer, title, land, surveys, etc.)?
28.0% - Guarantee a sale price for the employee's former residence?
42.1% - Actually purchase the employee's former residence?
65.2% - Pay a lease-termination penalty?
00.7% - Assist in the sale of a vacation home?
15.1% - Offer no assistance in the new location?
42.1% - Assist with the arrangement of a mortgage or swing loan?
34.7% - Pay a cash bonus?
47.0% - Offer a mortgage-interest differential?
20.3% - Offer a cost-of-living differential?

10. If your company will buy an employee's former residence — if no other buyer can be found within a reasonable time — how do you determine the sale price?

00.5% - Pay the employee's asking price
06.0% - Pay the employee's appraised value
02.0% - Negotiate with the employee
74.1% - Pay the average of several appraisals
07.1% - Arrange with a national realtor to act on behalf of the company and the employee
10.1% - Other

11. Does your company's moving policy allow more benefits for new hires or for transferees?

02.2% - New hires
57.7% - Transferees
40.0% - No difference

12. During 1987, what was the average cost per domestic move to your company for such "moving extras" as relocation firms; motel accomodations; family transportation; meals; maid service; appliance servicing;pre-move, house-hunting trips; and similiar items? Exclude any salary increases, the cost of van line services, housing compensation, and financial assistance to employees disposing of former residences.

41.3% - Less than $4,500
14.3% - $4,500 - $5,999
13.2% - $6,000 - $7,499
06.6% - $7,500 - $8,999
05.7% - $9,000 - $10,499
18.7% - $10,500 or more

13. During 1987, what was the average cost per domestic move to your company for direct van line packing and transportation services? Exclude "moving extras" as described in question B-12.

05.5% - Less than $2,000
14.5% - $2,000 - $2,999
28.3% - $3,000 - $3,999
23.0% - $4,000 - $4,999
13.7% - $5,000 - $5,999
14.5% - $6,000 or more

14. The total moving cost — the "extras" of question B-12 and the direct van line packing and transportation services of question B-13 — is what percentage of your company's total cost of relocating an employee?

16.4% - Less than 10%
26.0% - 11%-25%
24.5% - 26%-49%
32.9% - 50% or more

15. If your company arranges for the movement of household goods in connection with employee relocations, does it transport the goods . . .

21.8% - At a released rate of 60¢ per pound, per article?
14.3% - With declared value protection (depreciation value)?
63.7% - With full replacement value protection?

16. If your company ships at a released rate (60¢ per pound, per article), is your company . . .

45.6% - Self-insured at full replacement cost?
08.6% - Self-insured at a declared value protection?
21.5% - Instructing the carrier to settle as fully insured and charging the difference to your insurer?
24.1% - Instructing the carrier to settle at a released rate and having the relocating employee submit a second claim to your insurer for the difference?

17. If your company uses the declared value protection, what do you feel is the appropriate dollar-per-pound valuation?

36.8% - Less than $3.00
33.6% - $3.00-$3.99
17.8% - $4.00-$4.99
10.5% - $5.00-$5.99
01.0% - $6.00 or more

18. If your company does not currently arrange for full replacement value protection, are you planning to make that change?

11.7% - Yes
88.2% - No

19. How frequently is an employee's relocation affected by the employment status of that employee's spouse?

04.5% - Almost always
24.4% - Frequently
58.0% - Seldom
12.9% - Never

20. Did at least one of your employees decline the opportunity to relocate during 1987?

74.2% - Yes
25.7% - No

21. If you answered "Yes" to question B-20, did the number of employees declining relocation in 1987 . . .

14.6% - Increase from the 1986 level?
05.3% - Decrease from the 1986 level?
80.0% - Remain about the same as the 1986 level?

22. What reasons did the employees give for declining relocation? Check each applicable response.

51.4% - Cost of living in the new location
49.2% - Family ties
36.6% - Housing/mortgage concerns
39.2% - Spouse's employment
44.6% - No desire to move
04.6% - Other

23. Does declining the opportunity to relocate usually hinder an employee's career?

42.9% - Yes
57.0% - No

24. What percentage of your company's transferred employees leave after being transferred?

22.3% - None
72.5% - 1%-10%
04.5% - 11%-24%
00.5% - 25% or more

25. Which one of the following categories of your company's work force is most likely to experience the greatest number of relocations?

49.8% - Sales
20.6% - Plant/facility management
11.5% - Engineering
00.3% - Data processing
11.5% - Administration
02.5% - Research and development
00.3% - Finance
03.1% - Marketing

26. During which one of the following periods did your company make most of its moves?

06.5% - December 1986 - February 1987
21.7% - March 1987 - May 1987
56.2% - June 1987 - August 1987
15.5% - September 1987 - November 1987

27. What is the average age of your company's most frequently transferred salaried employee?

02.5% - Less than 25 years
13.1% - 25-30 years
36.1% - 31-35 years
36.6% - 36-40 years
10.6% - 41-45 years
00.8% - More than 45 years

28. Does your company have contractual agreements for the transportation/handling of (check each applicable response) . . .

28.0% - Products?
23.9% - Exhibits?
91.7% - Employee relocations?
19.4% - General commodities?
23.5% - Computers and/or office equipment?

29. What is the salary range of your company's most frequently transferred employee?

00.5% - Less than $15,000
00.2% - $15,000-$20,000
05.0% - $21,000-$25,000
13.2% - $26,000-$30,000
40.2% - $31,000-$40,000
40.5% - More than $40,000

PART C -- Transportation

1. With how many carriers does your company have contractual agreements for the transportation of household goods?

28.6% - One carrier
24.3% - Two carriers
21.3% - Three carriers
25.6% - Four or more carriers

2. If your company entered into a contract carriage agreement during 1987, what was the primary reason?

37.0% - Cost
47.7% - Service
15.2% - Reliability
0.00% - Claims Processing

3. In terms of evaluation, what has been your company's experience with such contract carriage arrangements?

45.2% - Excellent
50.6% - Good
04.0% - Fair
00.0% - Poor

4. Does your company use the services of a relocation service or a brokerage firm? Check each applicable response.

41.1% - Relocation service
08.3% - Brokerage firm
54.4% - Relocation and brokerage services not used

5. If you used a relocation service or a brokerage firm in 1987, which services did it provide? Check each applicable response.

36.4% - Counseling about the planning and details of moving
18.5% - Counseling about company policy
89.4% - Real estate sale and purchase
41.7% - Orientation tours in the new location
09.2% - Arrangement of family's transportation and accommodations
17.8% - Contact of household goods moving company
17.8% - Audit and/or payment of invoice
15.2% - Monitoring of shipment
11.9% - Assistance with employee claims preparation and submission
08.6% - Supplementary services (appliances, cleaning, etc.)

6. Would your company consider "one-stop shopping" as a means of securing all of the needed relocation services? That is, would you obtain — through a single source — real estate services, transportation services, counseling services, and so on?

36.0% - Yes
63.9% - No

7. Rank the following guidelines in terms of carrier evaluation ("1" = the most important).

1 - Service
3 - Employee feedback
4 - Claims processing
2 - Price

8. From your relocating employees' perspective, rank the following parts or aspects of a move in terms of importance ("1" = the most important).

2 - Salesperson/Origin Agent
1 - Packer
3 - Driver
5 - Destination Agent
4 - Claim processing in the envent of loss or damage

9. Rank the following guidelines in terms of carrier selection ("1" = the most important).

1 - Service
2 - Price
4 - Claims processing
3 - Reputation

10. Based on your experience, how would you classify the effects of deregulation on each of the following industries.

(a) Airline industry	**(b) General commodity trucking industry**	**(c) Household goods moving industry**
16.3% - Better for all users	21.8% - Better for all users	27.1% - Better for all users
50.4% - Better for some users	59.3% - Better for some users	57.5% - Better for some users
14.4% - Worse for all users	07.9% - Worse for all users	07.1% - Worse for all users
18.8% - Worse for some users	10.7% - Worse for some users	08.1% - Worse for some users

PART D -- International Relocations

(TO BE COMPLETED ONLY IF YOUR COMPANY PERFORMED ANY INTERNATIONAL RELOCATIONS DURING 1987)

1. Approximately how many international employee relocations was your company responsible for in 1987?

69.2% - 0-9
11.8% - 10-19
06.5% - 20-49
04.1% - 50-99
05.3% - 100-199
02.3% - 200-299
00.5% - More than 300

2. Do you anticipate that the number of employees your company will relocate internationally during 1988 will . . .

20.6% - Increase from the number moved in 1987?
18.1% - Decrease from the number moved in 1987?
61.2% - Remain about the same as the number moved in 1987?

3. Which of the following is your primary contact for international relocations?

55.5% - Van line
38.1% - International forwarder
06.2% - Other

4. Rank the following guidelines in terms of international carrier selection ("1" = the most important).

1 - Service
2 - Price
4 - Claims processing
3 - Reputation

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